

In addition to preparing a case management plan, counsel shall prepare a case management plan summary to submit to the court. The purpose of the summary is to provide the court with a simple, in-chambers reference regarding the case. The summary must fit on one page and include the following information in the following format:

MAGISTRATE JUDGE'S SUMMARY OF CASE MANAGEMENT PLAN

Date Approved: (for court's use) **Cause No.:**

Caption:

Pltf's Counsel: (include name and telephone number)

Deft's Counsel: (include name and telephone number)

Nature of Case: (state nature of claim (e.g. tort, breach of contract, employment discrimination (gender), etc.) and SHORT factual synopsis)

Defenses: (state SHORT factual synopsis and summary of defenses)

Discovery: Completed by (date in CMP)

Readiness: Trial in (month and year in CMP)

Trial Time: ____ days (also include whether trial by jury or to the court)

Motions Pending: (list any motions currently pending)

Motions Future: Amend pleadings/add parties by ____; summary judgment by ____
(dates in CMP)

Pltf's Demand: Due (date in CMP) **Defense Offer:** Due (date in CMP)

Settlement: Court settlement conference/private mediation (select one)

Remarks: (for court's use)

The use of unambiguous abbreviations is encouraged. A sample summary is attached for your reference.

MAGISTRATE JUDGE'S SUMMARY OF CASE MANAGEMENT PLAN

Date Approved: **Cause No.:** 1:02-CV-4562 LJM/WTL

Caption: John Smith v. Jane Doe, Inc.

Pltf's Counsel: Peter Piper: 555-1111

Deft's Counsel: Snow White: 555-2222

Nature of Case: Breach of implied warranty of merchantability; pltf purchased a briefcase manufactured by deft; handles on briefcase broke, briefcase opened, and pltf's very important papers flew out into traffic and were ruined

Defenses: Pltf misused briefcase by filling it too full; briefcase was merchantable and would not have broken otherwise

Discovery: Complete **12-1-03**

Readiness: Trial in **February 2004**

Trial Time: 3 days by jury

Motions Pending: None

Motions Future: Amend pleadings/add parties by **8-1-03**; summary judgment by **11-20-03**

Pltf's Demand: Due **10-1-03** **Defense Offer:** +15 days

Settlement: Parties request a settlement conf. with the M.J. in approx. 3 mnths

Remarks: